

**UNIT EFFECTIVENESS & CONTINUOUS LEARNING CHECKLIST***Examples provided are fictitious.***I. UNIT PURPOSE: WHY DOES THE UNIT EXIST?**

The Unit Purpose statement is succinct, indicates the unit's primary functions/activities, identifies the stakeholders the Unit serves, and conveys how the unit advances the mission and vision of the College. A Unit should have one unit purpose statement.

EXAMPLE: The Office of the President models the leadership, governance, and inclusive practices necessary to deliver on our mission as an exemplary public liberal arts college. We labor together to foster a teaching, learning, and working environment in which an exceptional student experience is centralized. Further, we ensure that success is achieved through the encouragement of diverse perspectives, collaboration, civil discourse, data-informed decision-making, and teamwork.

- Succinct
- Indicates primary function
- Identifies stakeholders
- Conveys how it advances the mission and *new* vision of the College

**II. UNIT OBJECTIVES: WHAT IS THE UNIT SEEKING TO ACHIEVE?**

Unit Objectives are equivalent to a unit-based goal. Most Units will have 3-5 Unit Objectives. A Unit Objective clearly describes what the unit is trying to accomplish. It is measurable, connected to Tasks, and *must* link to Objectives in *Boldly Ascending*. Unit Objectives *may* help influence, directly or indirectly, a Key Performance Indicator(s).

EXAMPLE: Value-added institutional relationships with national membership organizations.

BA OBJECTIVE(s): 3a, 3c, 3d

- 3-5 Unit Objectives describe what the unit is seeking to achieve
- Strategic (align to one or more of the Objectives in *Boldly Ascending*)
- Measurable
- Connect to Tasks

**III. TASKS: HOW WILL THE UNIT ACHIEVE THE UNIT OBJECTIVE?**

Unit Tasks describe actions or strategies that work to achieve a Unit Objective. One Unit Objective may be accompanied by multiple Tasks (no more than three). Tasks should help yield measurable results and, when applicable, may link to Budget Change or Capital Funding requests.

EXAMPLE: Audit of Institutional Memberships; Benchmark YoY Expenses/Engagement; Cost Benefit Analyses of Memberships

- Connect to Unit Objective
- Up to 3 Tasks per Unit Outcome (may be listed chronologically)
- Help yield measurable results

**IV. MEASURES: WHAT SOURCE OF EVIDENCE WILL SUPPORT THE UNIT'S WORK?**

Measures are the sources of evidence that capture if a Unit Objective is being met. Measures should be reliable data sources that are accessible to unit members. An administrative unit's plan may feature a combination of direct measures (stakeholder participation rates/attrition, response times, revenues and expenses, accuracy rates, etc.) and indirect measures (satisfaction surveys, focus group discussions, exit interviews, evaluations, etc.)

EXAMPLE: a. Adaptive Insights YoY Institutional Memberships Report; b. Annual Member Liaison Reports (item A5)

- Sources of data that are:
  - Reliable
  - Accessible
  - Direct and Indirect (where possible)
- Up to 3
- Connect to Unit Objective

**V. TARGETS: HOW MIGHT THE UNIT KNOW IF THE UNIT OBJECTIVE IS ACHIEVED OR ADVANCING?**

Targets are the yardstick by which unit objectives are largely measured. Targets are SMART: Specific, Measurable, Attainable but Aggressive, Results-oriented, and Time-bound. One Unit Objective may have multiple Targets.

EXAMPLE: a. Year over Year expense reduction in membership fees (direct). b. Sixty percent of Annual Liaison Reports will report increased engagement with membership association for FY24 (indirect).

- |  |   |
|--|---|
| <input type="checkbox"/> Specific                  | <input type="checkbox"/> Results-oriented       |
| <input type="checkbox"/> Measurable                | <input type="checkbox"/> Time-bound             |
| <input type="checkbox"/> Attainable but Aggressive | <input type="checkbox"/> Connected to Unit Task |

## VI. FINDINGS: WAS THE UNIT EFFECTIVE?

Findings reflect the Target language and indicate if the Target was not met, partially met, or met.

EXAMPLE: a. Partially met. From FY23-FY24, membership fee expenses decreased by 5% through a combination of fee negotiations and membership discontinuations. b. Forty percent of Annual Member Liaison Reports (N=45) reported increased engagement with membership associations for FY24 as verified by the Annual Member Liaison Reports.

- Reflect Target Language
- Denote if the unit objective was not met, partially met, or met

## VII. USE OF RESULTS: WHAT DID THE UNIT LEARN?

The "Use of Results" is where, in the planning cycle, we aim to "close the loop." The Use of Results should capture what was learned from the Findings *and* how the Findings were used to achieve, maintain, modify, or discontinue the unit objective. When applicable, the Use of Results may capture a relevant Action Plan for the next planning cycle.

EXAMPLE: a. Greater expense reductions were realized through membership fee negotiations than through discontinuation. As a result of this, the College will more routinely seek to negotiate membership fees. b. Of the 60% (27) of Annual Member Liaison Reports (N=45) which did not report increased engagement with membership associations for FY24, the vast majority of the Reports also reported the association did not provide virtual engagement opportunities. As a result of this, the Office of the President will 1) reconsider the target in light of current travel limitations, and 2) advance a "temporary suspension of membership" option to liaisons.

- Addresses what was learned from the Finding
- Describes how a Finding was used to achieve, maintain, modify, or discontinue the unit objective.

### UNIT EFFECTIVENESS & CONTINUOUS LEARNING FLOWCHART

